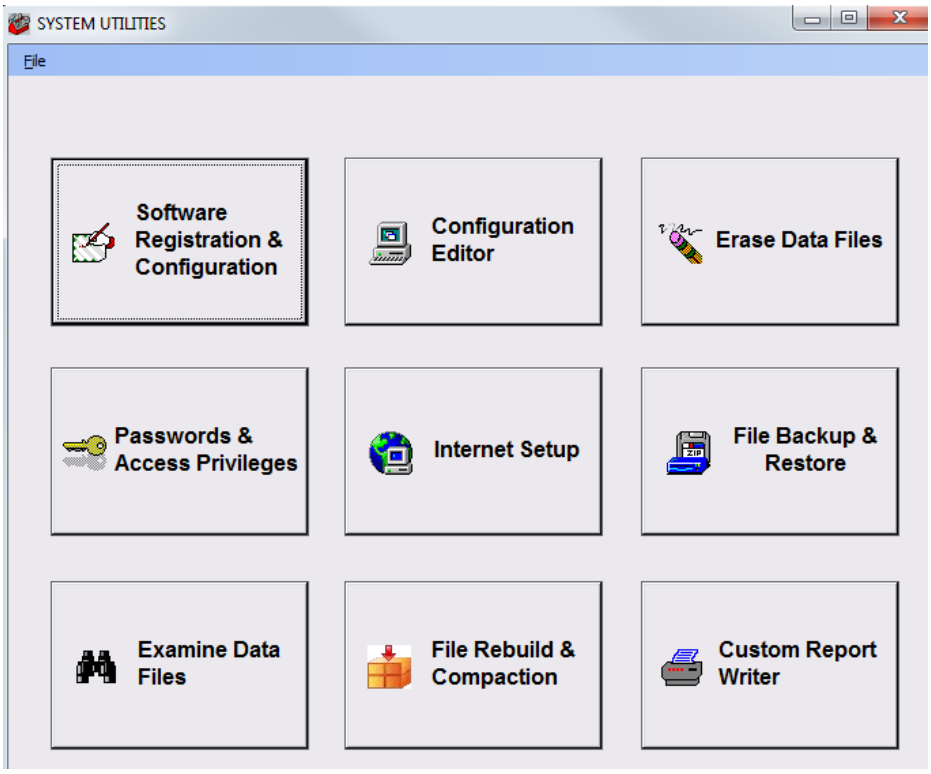
System Utilities

System Utilities Menu



System Utilities Functions allow you to do the following:

- ➔ Software Registration & Configuration
- ➔ Erase Data Files
- ➔ Internet Setup
- ➔ Examine Data Files
- ➔ Design Custom Reports
- ➔ Configure Your System
- ➔ Setup Passwords & Access Privileges
- ➔ File Backup & Restore Procedures
- ➔ File Rebuild & Compaction

Software Registration & Configuration

The **Software Registration & Configuration Screen** permits you to customize the software to meet your particular needs.

Each system is delivered with a temporary registration certificate which is valid for a period of 60 days from the date of installation.

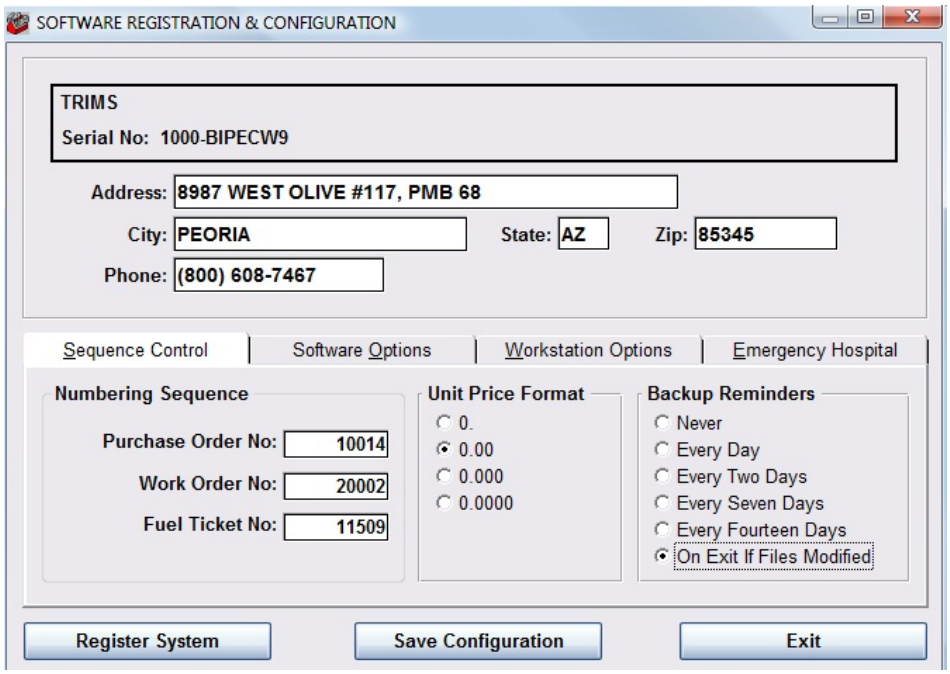
A Software License Agreement form is also included with each system and MUST be completed and returned to **TRIMS Software**. This is an important document as it tells us where to send program updates and what name will appear on report headings.

Upon receipt of the completed Software License Agreement, a Registration Certificate will be returned to you at the address indicated on the Software License Agreement. This permanent Registration Certificate contains your Serial Number, Registration Name and unique Activation Code that will allow you to remove the temporary registration notice and replace it with your Registration Name.

If the Temporary Registration period has expired, you will be prohibited from accessing Program Functions until a permanent registration is entered.

Activating an Expired Registration

If you start the software and the message **TEMPORARY REGISTRATION EXPIRED** is displayed and you have your Permanent Registration Certificate, click on **OK** to display the Software Registration & Configuration Screen.

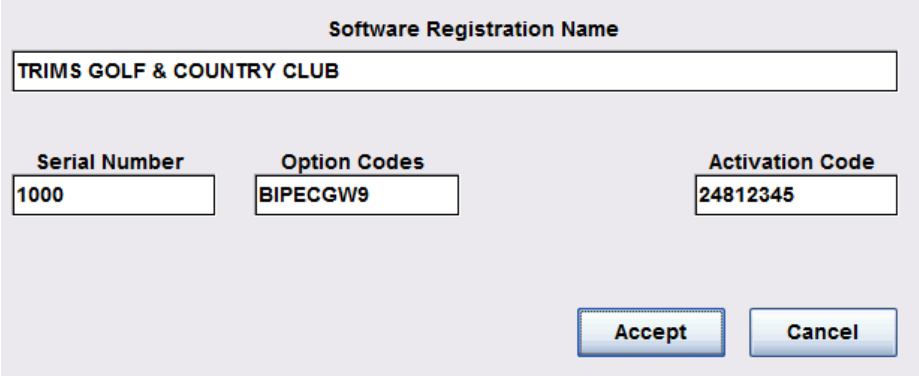


Permanent Registration

Before attempting to enter your permanent registration, you must have received a Permanent Registration Certificate registered in the name of your organization.

This process will remove the **TEMPORARY REGISTRATION** notices from the software and replace them with your registration name.

From the **Software Registration & Configuration Screen**, click on the **REGISTER SYSTEM** button.



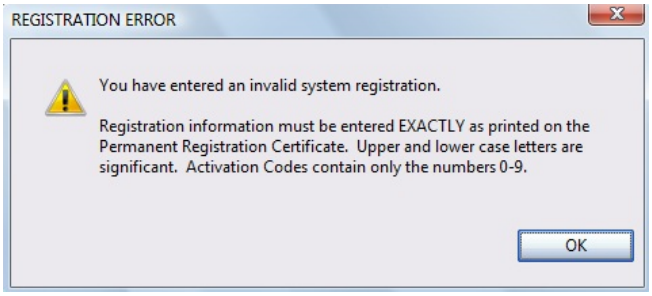
Enter the **Software Registration Name**, **Serial Number**, **Option Codes** and **Activation Code** EXACTLY as printed on the Permanent Registration Certificate. Upper and lower case letters, spaces and punctuation are all significant.

Only a valid Registration Name, Serial Number, Option Codes and Activation Code combination will be accepted and saved.

Once the Activation Code has been entered successfully, click on **ACCEPT** to save registration information.

Invalid Registration

If the Registration Name, Serial Number, Option Codes and the Activation Code are not entered EXACTLY as shown on the Permanent Registration Certificate, the following error message will appear:


REGISTRATION ERROR
You have entered an invalid system registration.
Registration information must be entered EXACTLY as printed on the Permanent Registration Certificate. Upper and lower case letters are significant. Activation Codes contain only the numbers 0-9.
OK

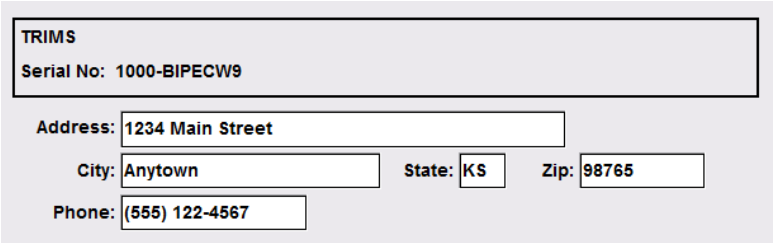
When the registration has been successfully completed, the Registration Name and Serial Number will appear in the box on the top of the **Software Registration & Configuration Screen**.

Configuring Your System

Once your System Registration Information has been entered, you may then configure the system to meet your specific needs.

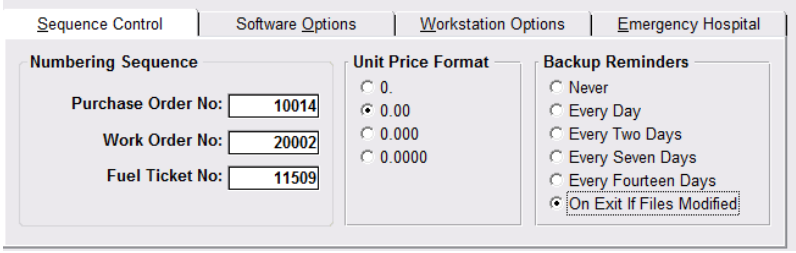
Address

Enter the **Address** that you wish to appear on all Purchase Orders and Work Orders.



Sequence Control

The **Sequence Control Tab** on the Software Registration & Configuration Screen allows you to specify beginning numbers for automatic numbering of Purchase Orders, Work Orders and Fuel Tickets. You can also specify the Inventory Unit Price Format and your Backup Reminder preferences.



Next Purchase Order Number - The number contained within this field will be assigned to the next Purchase Order generated within the Inventory & Purchase Order section. This field is automatically incremented as new Purchase Orders are created. Automatic incrementing of the **Next Purchase Order Number** will be disabled if a negative value (-1) is placed in this field.

Next Work Order Number - The number contained within this field will be assigned to the next Work Order generated within the Equipment Maintenance section. This field is automatically incremented as New Work Orders are created.

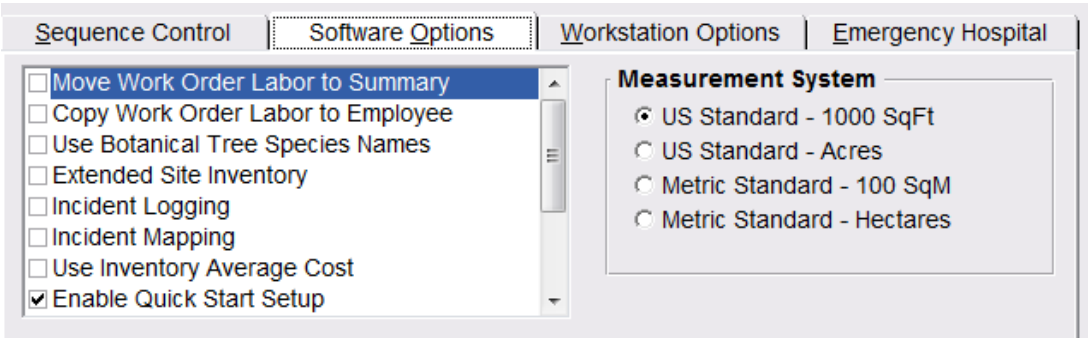
Next Fuel Ticket Number - The number contained within this field will be assigned to the next Pump Ticket generated within the Fuel Inventory section. This field is automatically incremented as new Pump Tickets are created. Automatic incrementing of the **Next Fuel Ticket Number** will be disabled if a negative value (-1) is placed in this field.

Unit Price Format - The setting of the **Unit Price Format** affects the number of decimal digits displayed on data entry screens and reports for Inventory Unit Prices.

Backup Reminders – The setting of the **Backup Reminders** option determines when the Backup Reminder appears on the Main Program Menu.

Software Options

The **Software Options Tab** allows you to configure the system operation to meet your needs. Software options need only to be set once and will apply to all workstations in a multi-user configuration.



Move Work Order Labor to Summary

If a checkmark is placed by **Move Work Order Labor to Summary**, Work Order Labor Detail will automatically transfer to the Labor Summary File.

Copy Work Order Labor to Employee

If a checkmark is placed by **Copy Work Order Labor to Employee**, Work Order Labor Detail will automatically transfer to the Employee's Pay Record if your system is set up for Project/Labor Tracking.

Use Botanical Tree Species Names

If a checkmark is placed by **Use Botanical Tree Species Names**, Botanical Species Names will appear on all Tree Inventory Reports and Screens otherwise Common Species Names will be used.

If you have not purchased the optional **Tree Inventory** program, the system will disregard this software option.

Extended Site Inventory

If a checkmark is placed by **Extended Site Inventory**, the Equipment Group - Add/Edit Bar will be replaced by a multi-tab entry screen as defined in the **SITELIST.TXT** File. ***See Equipment Groups for further details.***

Incident Logging

If a checkmark is placed by **Incident Logging**, you will be able to automatically Log Incidents when saving a Work Order or a Chemical Application.

Incident Mapping

If a checkmark is placed by **Incident Mapping**, you will be able to Log Incidents on a Map providing there is a checkmark is placed by **Incident Logging**.

Use Inventory Average Cost

The setting of the **Use Inventory Average Cost** option will determine the cost basis for inventory used on work orders, fuel tickets and chemical applications. If checked, Average Cost will be used on all Purchase Orders, Work Orders and Inventory Reports. If unchecked, Last Cost will be used.

Enable Quick Start Setup

The **Quick Start Setup**, gives you access to all the initial setup functions of your system where you can mark off tasks as they are completed. If a checkmark is placed by this option, the Quick Start Setup will be activated.

Enable Setup Wizard

The **Setup Wizard** guides you through the initial setup of your system and creates essential data files based upon your responses to simple questions and insures that you will have an error free foundation for the entry of your site specific data. Once processed, the **Setup Wizard** will be automatically disabled. Placing a checkmark in this field will activate the Setup Wizard.

WARNING: Once completed, the Setup Wizard should NOT be run again. Re-activating the Setup Wizard can cause EXISTING DATA FILES to be DESTROYED!

Postal Code as City Prefix on Reports

This software setup option is primarily for our international customers. When selected, the address format on all printed documents will have the Postal Code or Zip Code preceding the City Name.

Example:

Option Selected:
Schultz Izer Werks, AG
69A Rozen Platz
01859 Frankfurt

Option Not Selected:
Schultz Izer Werks, AG
69A Rozen Platz
Frankfurt, 01859

Summarize Project Labor Before Reporting

When using the Labor Tracking features, the Project/Labor Reports will collect and summarize Employee Labor Activities for the time period being reported when this option is selected.

If not selected, the New Pay Period Initialization procedure MUST BE performed in order to summarize Labor Activities before printing Project/Labor Reports.

Charge Purchase Order Parts to Equipment

If using Purchase Orders, a Equipment/Property Number field will appear on the Purchase Order – Line Item - Add/Edit Panel allowing costs of Parts to be charged directly to the Equipment/Property File.

Do Not select this feature if you are allocating Parts via a Work Order. This will create duplicate costs to Equipment/Property.

Allocate Chemical Application Cost to Budget by Dept.

If using Budget Departments and recording Invoices through Purchase Orders, purchase costs of Chemicals can be transferred from the Budget Account identified in the Inventory Expense Classification Table to a specific Budget Department at the time when chemical usage is recorded in the Chemical Applications Log.

Please contact TRIMS Technical Support Department if you wish to use this feature to ensure your Budget/Expense Accounts are setup properly for Department Cost Allocation.

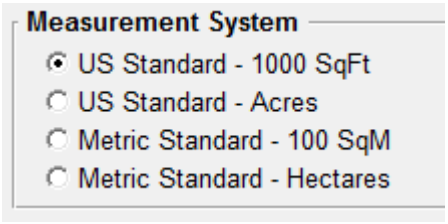
Restrict Inventory Editing to Administrator Only

If a checkmark is placed by **Restrict Inventory Editing to Administrator Only**, all users except the TRIMS Administrator will be prohibited from making changes to existing stock quantities or pricing on the **Inventory - Add/Edit/Delete** Screen when the TRIMS Password System is Active.

Measurement System

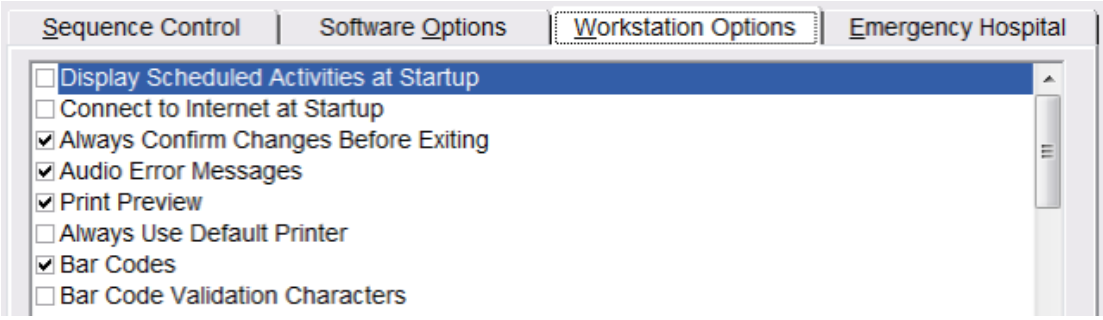
If you would like a different **Measurement System** other than marked, please select a different Measurement System.

It is **NOT** recommended to make changes AFTER Chemical Application Records have been entered.



Workstation Options

The **Workstations Options Tab** allows you to configure the operation of each individual workstation in a single computer system or multi-user configuration.



Display Scheduled Activities at Startup

If a checkmark is placed by **Display Scheduled Activities at Startup**, each time the system is started, a reminder screen will appear containing items scheduled for the current day as well as a list of all Equipment and Property now due for service.

Connect to Internet at Startup

If a checkmark is placed by **Connect to Internet at Startup** and if TRIMS is configured to use the Internet, once each day when TRIMS is started, your system will connect to the TRIMS Software Server and will download any News or Update Notices.

Always Confirm Changes Before Exiting

If a checkmark is placed by **Always Confirm Changes Before Exiting**, a message will appear on screen if you attempt to leave a data entry screen before saving your changes.

Audio Error Messages

If a checkmark is placed by **Audio Error Messages** and your computer has a Sound Card installed, you will hear descriptive error messages through your computers audio system whenever error conditions occur.

Print Preview

If a checkmark is placed by **Print Preview**, the output of your reports will be sent to the screen for on screen viewing.

On screen scroll features allow you to page through the print file and review the information prior to printing the report. **Print Preview** will handle reports with a maximum of 6000 printed lines or approximately 100 pages.

Once displayed, you can print all or a portion of your report or copy a page to the windows clipboard.

Always Use Default Printer

If a checkmark is placed by **Always Use Default Printer**, all print output will go directly to the default printer or to Print Preview depending on the setting of the Print Preview option.

If **Always Use Default Printer** is **Not Selected**, a printer dialog window will appear and allow you to select a printer whenever the **PRINT** tool is used to initiate printing a report. Print output will then go to the selected printer or to Print Preview depending on the setting of the Print Preview option.

Bar Codes

If a checkmark is placed by **Bar Codes**, Bar Code printing functions built into your system are enabled.

Bar Codes Validation Characters

If a checkmark is placed by **Bar Codes Validation Characters**, Bar Code Labels will be printed with an imbedded validation prefix.

For further information, use the **DocView Document Viewer** to read the **TRIMS TriCoder User Guide.PDF**.

Show Parts Location on Purchase Orders

If a checkmark is placed by **Show Parts Location on Purchase Orders**, the Inventory Parts Location will be printed on Purchase Orders in place of Item Size.

Show Parts Location on Work Orders

If a checkmark is placed by **Show Parts Location on Work Orders**, the Inventory Parts Location will be printed on Work Orders in place of Item Size.

Show Work Order Labor Tab as Default

If a checkmark is placed by **Show Work Order Labor Tab as Default**, the Labor Tab will be the first tab active when creating a Work Order.

Suppress Printing of Work Order Labor Section

If a checkmark is placed by **Suppress Printing of Work Order Labor Section**, Work Orders will not print the Labor Section.

Suppress Printing of Work Order Parts Section

If a checkmark is placed by **Suppress Printing of Work Order Parts Section**, Work Orders will not print the Parts Section.

Suppress Blank Lines on Printed Work Orders

If a checkmark is placed by **Suppress Blank Lines On Printed Work Orders**, Work Orders will only print the lines that contain data.

Show Remarks Tab as Default on Employee Add/Edit Screen

If a checkmark is placed by **Show Remarks Tab as Default on Employee Add/Edit Screen**, upon opening the Employee Add/Edit Screen will first display the Remarks Tab instead of the Current Information Tab.

Show Budget Balances on Printed Purchase Orders

If a checkmark is placed by **Show Budget Balance on Printed Purchase Orders**, Purchase Orders will print Budget VS Expense information at the bottom of the Purchase Order.

Variable Fuel Cost on Pump Tickets

If a checkmark is placed by **Variable Fuel Cost on Pump Tickets**, a field will appear on the Pump Ticket Data Entry Panel allowing a manual entry for the Fuel Cost per Gallon.

Allow Retail Fuel Purchase Pump Tickets

If a checkmark is placed by **Allow Retail Fuel Purchase Pump Tickets**, the cost of fuel purchased at retail fuel outlets can be directly charged to the appropriate Budget/Expense Account without affecting inventory.

Automatic Fuel Pump Selection

If a checkmark is placed by **Automatic Fuel Pump Selection**, fuel pump and/or fuel type is automatically determined when recording a new Pump Ticket.

Dynamic Lookup Lists

If a checkmark is placed by **Dynamic Lookup Lists**, the behavior of the yellow look-up fields changes. As the user types into any yellow field, a drop down window will appear to show items that closely match the typed data. Select the desired item from the Lookup List or use the Look-Up Tool to search for the desired item.

Auto Start Cloud Server

If a checkmark is placed by **Auto Start Cloud Server**, the TRIMS Cloud Server will automatically launch whenever TRIMS is started.

Smooth Scrolling

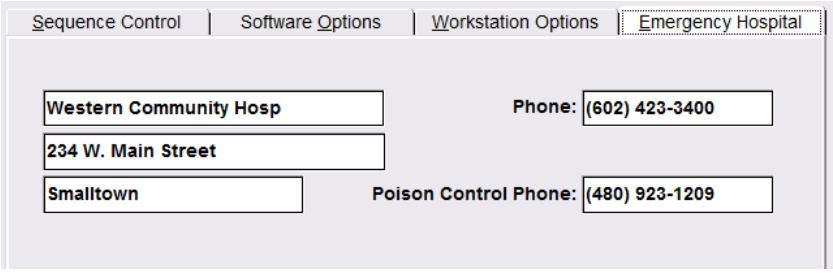
If a checkmark is placed by **Smooth Scrolling**, data on screen will move as the scroll bar is slid up and down. *This selection is NOT recommended for customers with a large amount of Tree data.*

Suppress Desktop Calendar

If a checkmark is placed by **Suppress Desktop Calendar**, the calendar will not be displayed on the TRIMS Main Menu.

Emergency Medical Assistance

The **Emergency Hospital Tab** allows you to enter the **Name and Address** of the nearest Hospital with Emergency Room facilities and the Phone Number of the Local Poison Control Hot Line. This information will automatically be printed on the Chemical Toxicity Statements.



Saving Your Entries

Once all entries have been made, click on **Save Configuration** button to exit to the Systems Utilities Menu.

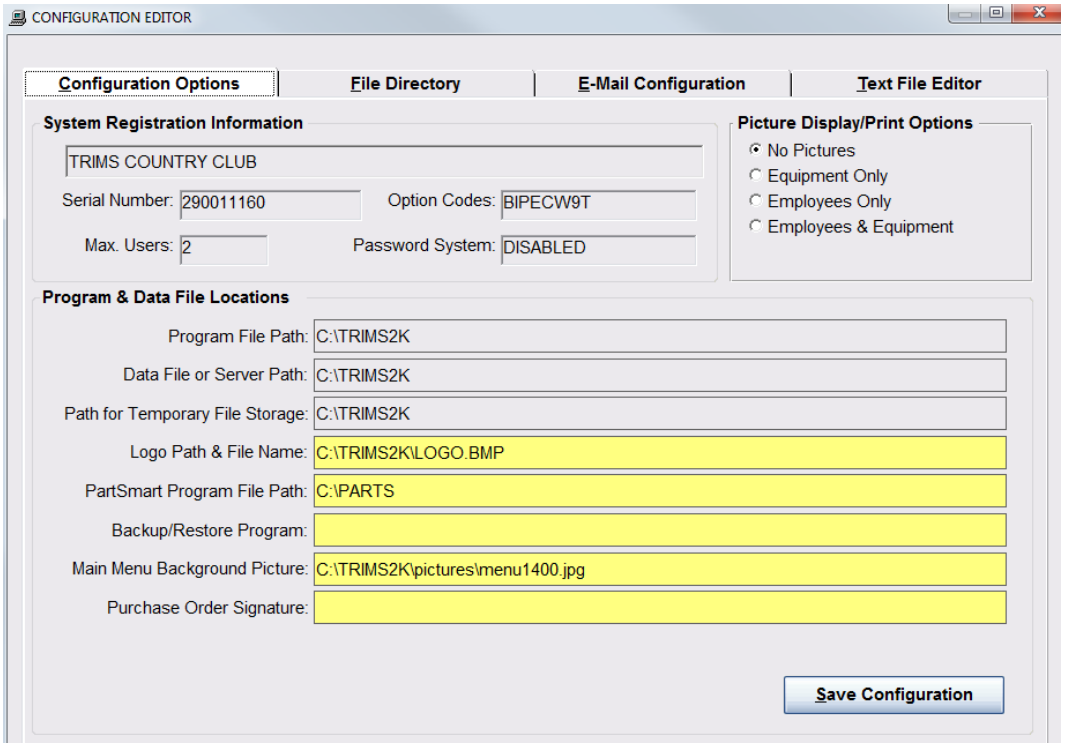
Configuration Editor

Many of the different configuration options for an individual Work Station can be viewed or edited with the TRIMS Configuration Editor. Configuration items include program and data file path names, external program names, picture display/print options and E-Mail Configuration. The Configuration Editor also contains a Text File Editor for changing user defined field labels and Bar Code import control files.

From the **System Utilities Menu** select **Configuration Editor** or from the **TRIMS Program Group** select **Configuration Editor**.

Configuration Options

The **Configuration Options Tab** displays all system details describing your current configuration.



Program & Data File Locations

The items in the Program & Data File Location section are used to specify path names, file names and commands used to access data files and external program functions.

You may double click in any of the yellow fields to browse your computers file system to locate specific files or directories.

Program File Path

The path name indicating the location of the TRIMS Program Files on this computer.
This option may only be changed when starting the Configuration Editor from the TRIMS program group.

The default location is: **C:\TRIMS2K**

Data File or Server Path

The path name indicating the location of the TRIMS Data Files on this computer or the Network.
This option may only be changed when starting the Configuration Editor from the TRIMS program group.

The default location is: **C:\TRIMS2K**

Path for Temporary File Storage

The Path for Temporary File Storage must point to folder on this computer that has Full Access Rights enabled for all users. This folder is used to store temporary files required by TRIMS. *This option may only be changed when starting the Configuration Editor from the TRIMS program group.*

The default location is: **C:\TRIMS2K**. *You may also use values TMP, TEMP, or USERPROFILE to store temporary files in one of these predefined locations (Environment Variables) unique to the currently logged in user.*

Logo Path & File Name

The LOGO Path & File Name is used to specify the Path and File Name of a logo that is to be printed on all Work Orders and Purchase Orders. Logos can be either Monochrome or Color pictures in either BMP, GIF, or JPG format.

The maximum physical size of a Logo Picture is 1.5" Wide X 0.95" High (150 Pixels X 90 Pixels) and the logo is always printed 6.5" from the left edge of the document and 0.5" from the top of the document.

The default location is: **C:\TRIMS2K\LOGO.BMP**

If logos are not to be printed, leave this field blank.

PartSmart® Program File Path

If you have installed the optional PartSmart® CD-ROM Parts Catalog, this field must contain the path name indicating the location of the PartSmart® program files.

Here is an example: **C:\PARTS**

Backup/Restore Program

To Backup or Restore data files using a procedure other than the standard PKZIP method provided with the system, use this field to specify the command line needed to start your User Defined Backup/Restore procedure.

The Backup/Restore Program name can also be defined using the ***System Utilities - File Backup/Restore Function on page 49****.*

Here is an example: **C:\Tools_95\Backup\Backup32.exe /B**

Main Menu Background Picture

The Picture Background on the main program menu can be changed to display your favorite picture. Enter the Path and File Name of the picture in the Main Menu Background Picture Field or leave this field blank to display the standard (default) menu picture. Pictures files can be in JPG, GIF, BMP or WMF format and should be large enough to fill the screen.

Purchase Order Signature

The Purchase Order Signature field is used to specify the Path and File Name of a graphic file that is to be printed as a footer on all Purchase Orders. Signature files can be either Monochrome or Color in either BMP, GIF, or JPG format.

The maximum physical size of a Signature Image is 6" Wide X 3.5" High. The image is always printed 0.5" from the left edge of the document and replaces the standard signature lines at the end of the printed Purchase Order.

If a custom Signature File is not to be printed, leave this field blank.

Picture Display/Print Options

The Picture Display/Print Options allows you to specify if your system is to print Employee and Equipment Pictures on reports.

Pictures can be either Monochrome or Color in BMP, GIF, or JPG format. The maximum allowable picture size is 2” Wide X 1.2” High (200 Pixels X 120 Pixels).

After changing any of the items displayed, click on the **Save Configuration** button to save your changes and exit.

File Directory

The **File Directory Tab** is used by TRIMS Technical Support Staff to help you in diagnosing any Program or Data File problems you may be experiencing.

Use the File Selection options to display File Names, Revision Dates and File Sizes of all files that make up your System.

E-Mail Configuration

The **E-Mail Configuration Tab** is used to setup your system's E-Mail features.

Enter **Your Name** as you wish it to appear on the Email you send and enter **Your E-Mail**. Then click on the down arrow to select your **Dial-Up Connection**.

Once all E-Mail information has been entered, click on **Update Now**.

*E-Mail Information can also be defined using the **System Utilities - Internet Setup Function**.*

Text File Editor

Bar Code Data Import Formats and user specific information such as field labels for Extended Site Inventory, Scheduled Activity Subjects and Tree Inventory may be modified by using the **Text Editor Tab**.

Opening a File

To open a text file, select the file from the Text Files List and path and file name assigned to the specified file will appear in the yellow file name field. If User Specified File is selected, enter the path and file name of the desired file.

After the path and file name has been entered or displayed, click on **Open File** to display the contents of the selected file.

Saving a File

Once all changes have been made to the contents of the displayed file, click on **Save File**.

To close the file without saving changes, click on **Cancel Edit**.

Text File Descriptions

Extended Site Inventory Header - ***See Equipment Groups***

Labor Hours Import Header - ***See Bar Code Functions***

Work Order Import Header - ***See Bar Code Functions***

Physical Inventory Import Header - ***See Bar Code Functions***

Equipment Usage Import Header - ***See Bar Code Functions***

Fuel Usage Import Header - ***See Bar Code Functions***

Tree Inventory Import Header - ***See Bar Code Functions***

Tree Work Activity Import Header - ***See Bar Code Functions***

Tree Inventory Field Labels - Field labels on Tree Inventory Data Entry Screens and Reports can be customized by editing the contents of the Tree Inventory Field Labels File.

Tree Inventory Street Names - Street Names can be predefined to appear in a drop-down window on the Tree Inventory Data Entry Screens to ensure data entry accuracy.

Incident Layers - Incident layers or classifications for mapping incidents can be customized by editing the contents of the Incident Layers File.

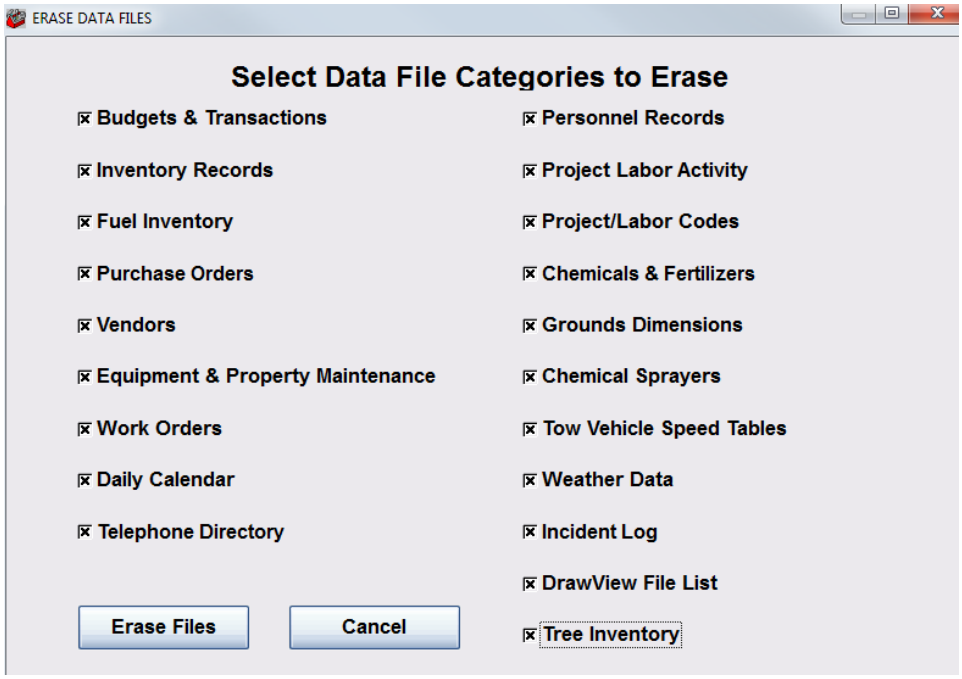
Chemical Functions – List of user defined Chemical Product Functions.

When editing these files, the information to the right of the equal sign is the only information that should be changed. Text to the left of the equal sign specifies the field label to be replaced.

Erasing Sample Data Files

Each system is shipped with sample data in the files. Please examine the sample files to familiarize yourself with the software before erasing the sample data.

ALL FILES MUST BE CLEARED OF SAMPLE DATA BEFORE ENTERING YOUR OWN LIVE DATA INTO THE SYSTEM!

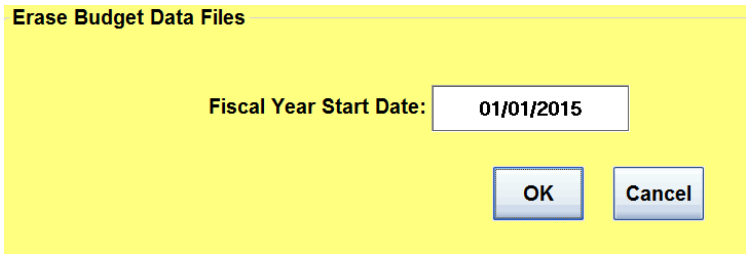


Click on the **Categories** to be erased and click on **ERASE FILES**.

Erasing Sample Data Files will also Disable the Setup Wizard.

Fiscal Year Start Date

If you have selected to erase Budgets & Transactions, once the delete request is confirmed a window will appear and you can then set the **Fiscal Year Start Date** to indicate the start of your Fiscal Year.



Files Erased in Each Category

Budgets & Expenses	Chart of Accounts
	Budget/Expense Transaction File
	Budget/Expense Project Descriptions
	Department Names
Inventory Records	Inventory File
	Inventory Transactions
	Inventory Expense Classifications
	Vendor Parts Cross Reference
Fuel Inventory	Daily Fuel Pump Tickets
	Fuel Tank Specifications
	Fuel Pump Specifications
	Fuel Tank Inch to Gallons Tables
Purchase Orders	Purchase Order Header File
	Purchase Order Line Item File
	Purchase Order Notes
Vendor	Purchase Order Vendor File
	Vendor Parts Cross Reference
	Vendor Notes
Property Maintenance	Equipment/Property File
	Equipment Group Descriptions
	Equipment Type Descriptions
	Equipment Maintenance Records
	Preventative Maintenance Check Lists
	Preventative Maintenance Parts Lists
	Equipment Notes
Work Orders	Work Order Header File
	Work Order Parts Used
	Work Order Labor Records
	Work Order Notes
Daily Calendar	Calendar of Events
Telephone Directory	Telephone Listings

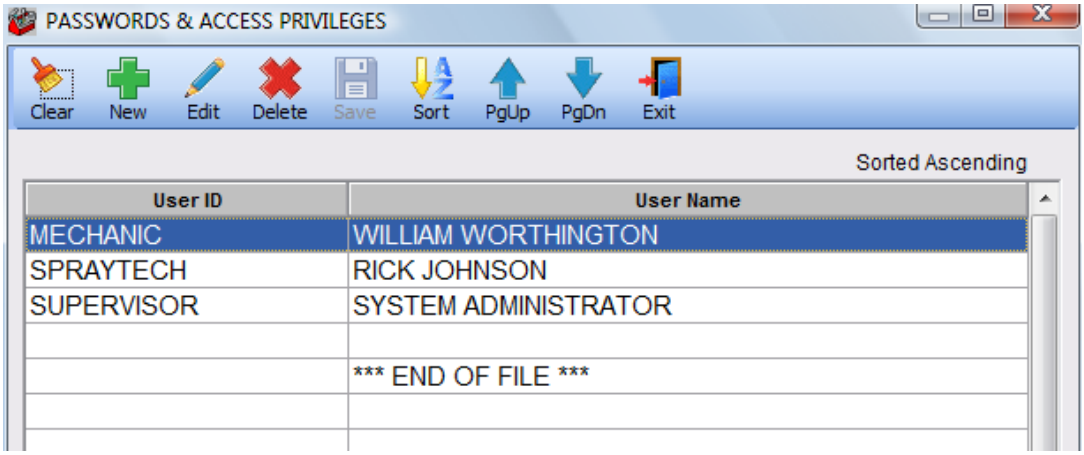
Personnel Records	Employee File
	Employee Pay Record
	Employee Project/Labor Hours
	Payroll Daily Hours W/Tracking
	Personnel Note File
	Employee Training Topics/Classes
	Employee Training Record
	Accident & Injury Log
Project/Labor Activity	Project/Labor Accumulator
Project/Labor Codes	Project & Labor Description Codes
Chemicals & Fertilizers	Chemical/Fertilizer File
	Chemical/Problem Cross Reference
	Fertilizer & Seed Information
	Soil Nutrient Accumulation
	Chemical Application Log
	Material Safety Data Sheets
	Chemical Tank Mix Formulation
	Granular Product Spreader
	Chemical Application Log Notes
Grounds Dimensions	Grounds Dimensions File
Chemical Sprayers	Sprayer Configurations
Tow Vehicle Speeds Table	Tow Vehicle Speed Calibrations
Weather Data	Weather Data Base
Incident Log	Incident Log File
DrawView File List	DrawView File Names
Tree Inventory	Tree File
	Tree Maintenance Activities
	Tree Height, Species, and Diameter Codes
	Tree Work Requests

Passwords & Access Privileges

The Password System will restrict access to individual Program Functions. Use the **Passwords and Access Rights** to allow read/write, read only, or restricted access privileges to individual users. Upon installation of the software, the Password System is disabled and passwords will not be required for access to Program Functions.

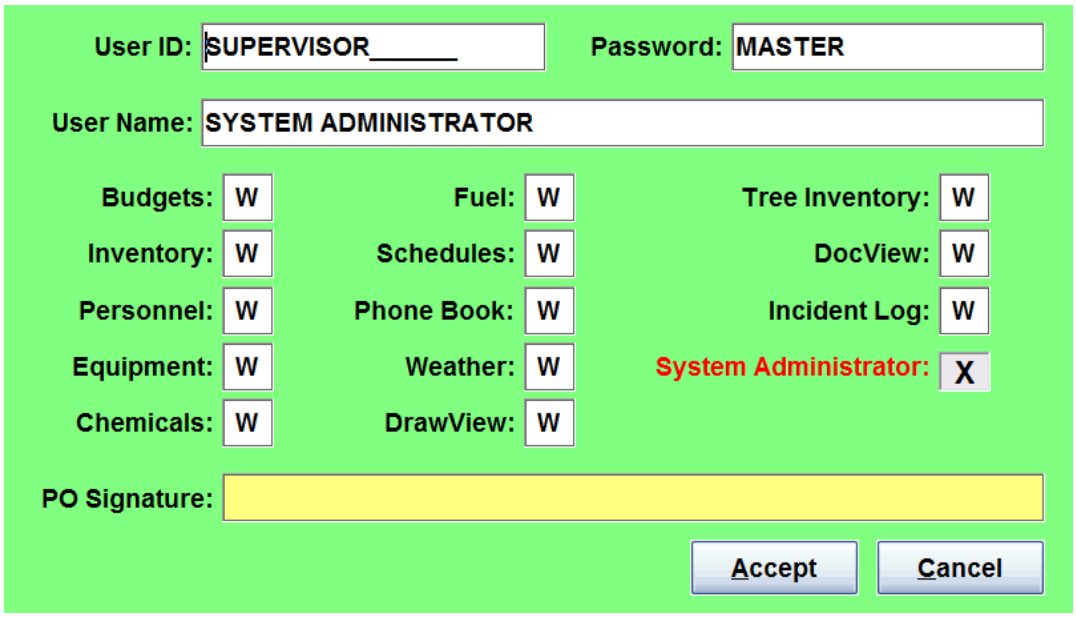
Passwords and access privileges can ONLY be modified by the System Administrator.

Only the System Administrator is allowed to access the System Utilities Functions.



Adding Passwords & Access Privileges

From the **Passwords & Access Privileges Browse Table**, click on the **NEW** tool and the **Add/Edit Panel** will appear.



Enter the **User ID** up to 16 characters and the **Password** up to 12 characters in length.

Next, enter the **User Name** and place either a **W**=Read/Write, **L**=View/Edit but not Delete, **R**=Read Only, or **N**=No Access in the field to the right of each of the System Functions.

Click on **System Administrator** to place an **X** indicating that the user listed has **System Administrator Privileges**.

The PO Signature field is used to specify the Path and File Name of a graphic file that is to be printed as a footer on all Purchase Orders ONLY for this User. Signature files can be either Monochrome or Color in either BMP, GIF, or JPG format. The maximum physical size of a Signature Image is 6" Wide X 3.5" High. The image is always printed 0.5" from the left edge of the document and replaces the standard signature lines at the end of the printed Purchase Order.

If this field is left blank and a PO Signature File is placed in the Configuration Editor *(see page 39),* then that signature will then be used. If all Signature fields are left back then a blank line will automatically be printed on the Purchase Order.

If a custom Signature File for this User is not to be printed, leave this field blank.

Click on **ACCEPT** when entry is complete.

The Password System is activated the first time the System Administrator Password is SAVED.

Remember your Administrator Password - it is the only way to gain access to System Utilities.

Editing Existing Passwords & Access Privileges

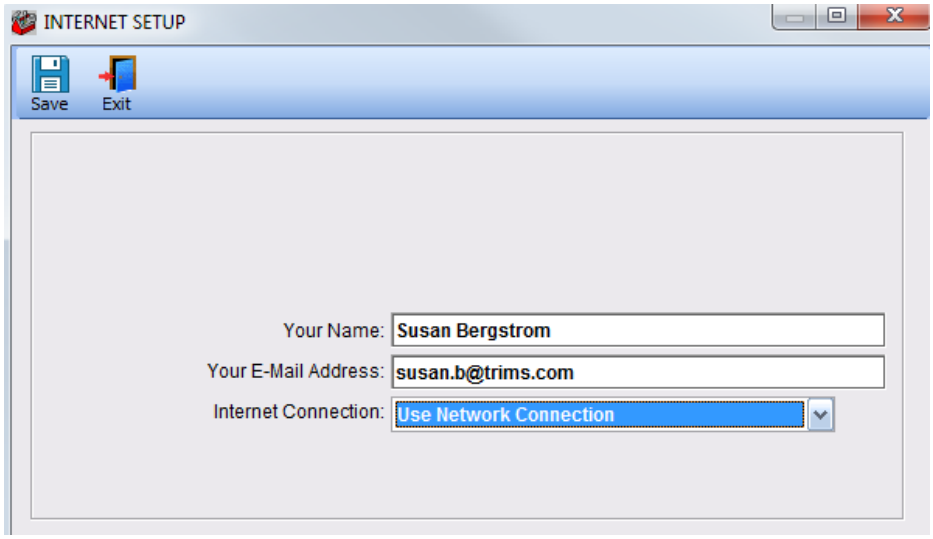
From the **Passwords & Access Privileges Browse Table**, position the scroll bar on the **User Name** to be changed and click on the **EDIT** tool. The **Add/Edit Panel** will appear with the selected information displayed. Once the information is displayed, you can make any necessary changes.

Deleting Passwords & Access Privileges

From the **Passwords & Access Privileges Browse Table**, position the scroll bar on the **User Name** to be deleted and click on the **DELETE** tool. The **Delete Confirmation Window** will appear asking for confirmation of the delete request.

Internet Setup

The **Internet Setup Screen** is used to activate Email Services for **TRIMS RapidAssist** and **Backup to TRIMS FTP Server** functions.



Enter **Your Name** as you wish it to appear on the Email you send and enter **Your E-Mail Address**.

Next click on the down arrow to select your **Internet Connection**. If using DSL, Cable or any other "Always On" internet connection, select **Use Network Connection**.

Once E-Mail information has been entered, click on the **SAVE** tool.

File Backup & Restore Procedures

Periodic backup copies of your Data Files (*.DAT) **must be made on a regular basis** to insure against loss of data in an event of system failure or operator error.

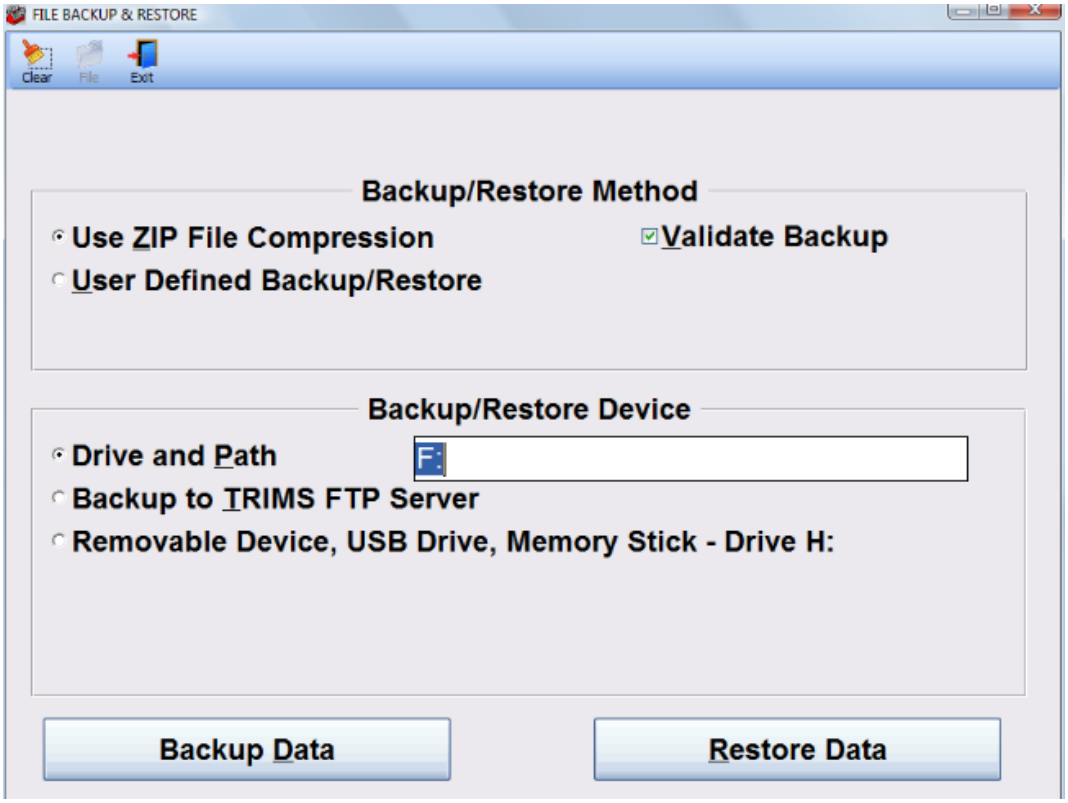
Two methods for Backing Up and Restoring Data Files are provided.

Use PKZIP File Compression

This procedure allows you to easily backup your data files to diskette and requires that you have several formatted disks ready for use prior to beginning the backup procedure.

If you are backing up your data files to Non-Diskette Media, the Backups will be Sequentially Numbered. For example: **T021913_1245.zip = Tmmddyy_hhmm.zip =** TRIMS Backup dated February 19, 2013 at 12:45 pm.

Validate Backup - When performing a Backup or Restore function with the **Validate Backup Option** selected, a test of the Backup Diskettes will be performed to insure the validity of the backup data set **After Backup Creation** or **Before Restoration**.



Backup Data Files

Select the **Drive Letter** (Backup Device) and insert the first diskette into the drive and click on **Backup Data**. You will be asked to insert additional diskettes as required.

The Removable Device option is ONLY available if a ZIP Drive, USB Drive or Memory Stick is attached to your computer.

Making a Backup On CD-ROM

Backup to a CD-ROM burner is possible if you have a CD-ROM burner that is compatible with the UDF-Packet Writing Format and you have a CD burning program capable of writing in UDF.

Currently, the two best UDF Packet Writing solutions of "drag-and-drop" storage that permit Drive Letter Access to CD-RW Drives are Nero's InCD EasyWriter & Roxio's DirectCD. ***Neither of these products perform as reliably as would expected for archival purposes and consequently, we recommend that you do not rely on these devices as your only means of backup.***

Before making a Backup to a CD-ROM using UDF Packet Writing, you must format the CDR using the software that came with your CD-ROM Burner. Please refer to your software's help file or user's manual for detailed instructions.

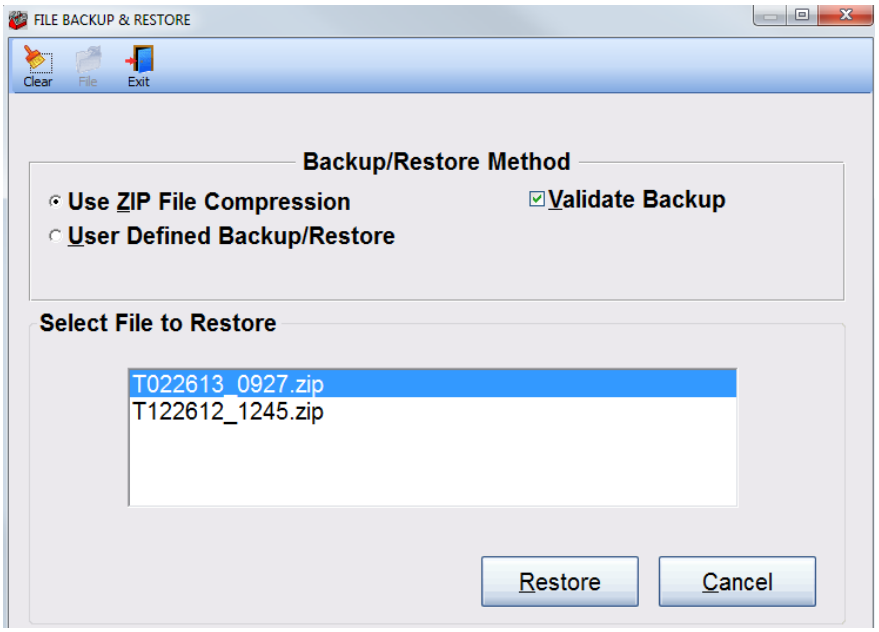
Once your CD-ROM is property formatted for your machine, select Drive and Path option and enter the CD-ROM drive letter followed by a colon. Ex: **G:**

The preferred method of making a CD-ROM backup is to use the Drive and Path option and make your backup to drive C:. Once the backup has been made, use your CD project burning software to copy the file Tmmddyy_hhmm.zip to the CD and save the CD as a Multi-Session CD.

Restore Data Files

To restore Data Files contained on your backup diskettes, select the Drive Letter (Restore Device) and insert the first backup disk to be restored into the drive and click on **Restore Data**. You will be asked to insert each disk of the backup set as required.

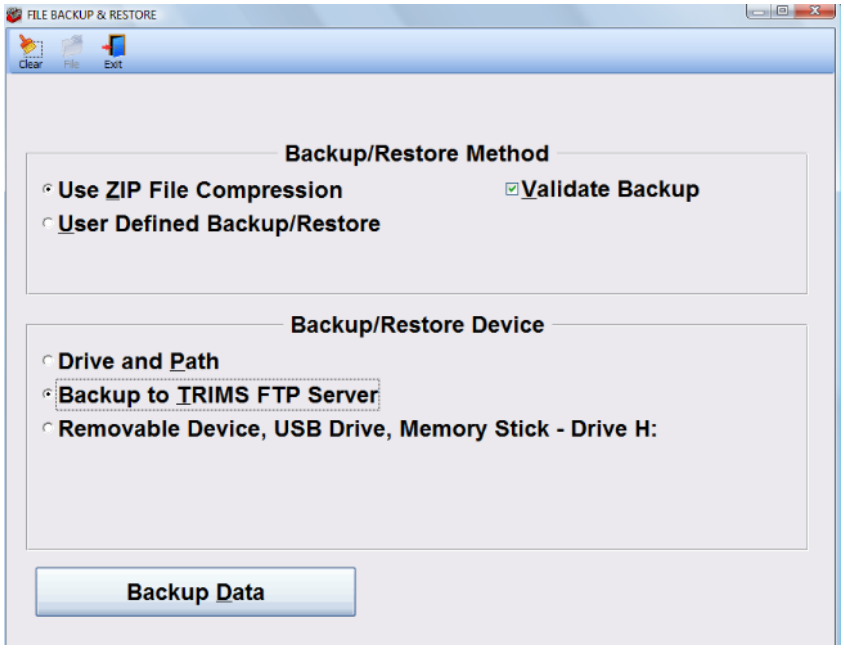
If you are restoring up your data files from Non-Diskette Media, a File Browser will appear allowing you to select a Specific Backup File. Click on **Restore** when the Backup File has been selected.



Backup to TRIMS FTP Server

TRIMS gives you the ability to backup and send your data files directly to TRIMS FTP Server for help with resolving data issues.

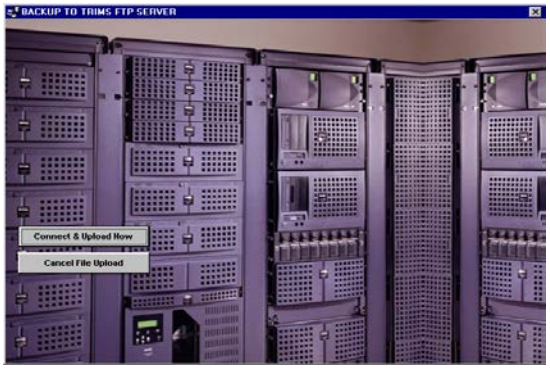
This Backup to TRIMS FTP Server option is ONLY available if the TRIMS Internet Setup Function has been completed.



Select **Backup to TRIMS FTP Server** and click on **Backup Data**. The TRIMS data files will be "deflated" and the **TRIMS Server Window** will appear.

Click on **Connect & Upload Now** to begin the file transfer, please be patient while waiting for backup to begin.

Upon completion an Email will be sent to you at the address specified in TRIMS Internet Setup.

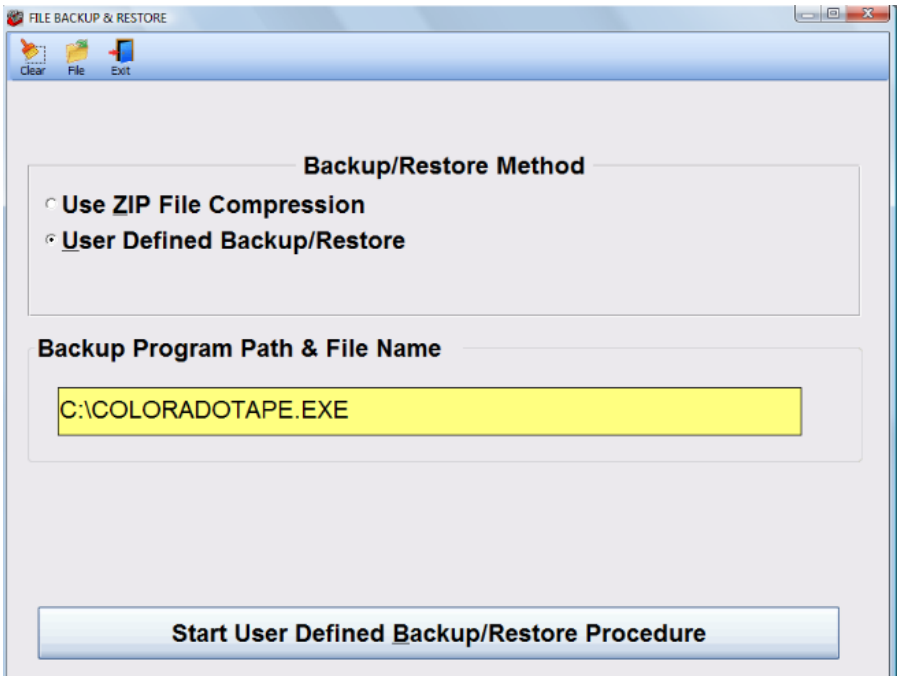


User Defined Backup/Restore

Select **User Defined Backup/Restore** to start the Backup/Restore program of your choice.

The first time you attempt to run the User Defined Backup/Restore procedure you will be asked to enter the **Path and Program Name** of the Backup Program in the space provided. If you are unsure about the exact path or file name, double click on the field or click on the **LOOK-UP** tool and a file browser will appear allowing you to locate the Backup Program.

Once the proper file name is displayed you can continue. The Backup/Restore Program Path and Program Name is stored in the Configuration Editor and can be edited as needed.



Click on **Start User Defined Backup/Restore Procedure** to start your User Defined Backup/Restore Process. It is your responsibility to configure your backup program to backup the following files in the **data directory**:

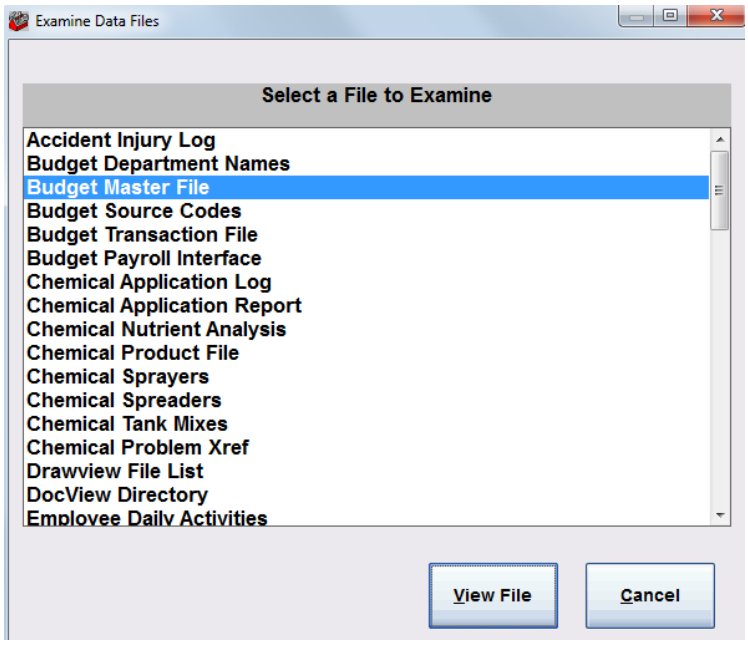
Data Files	***.DAT**
Budget History Files	***.DLM, *.DLT**
Custom Report Formats	**\REPORTS*.RCF**
Miscellaneous User Defined Files	***.TXT, *.MDB**

To restore Data Files contained on your User Defined Backup Media, click on **Start User Defined Backup/Restore Procedure** and follow procedures as specified by your Backup/Restore Software to restore all files from the backup set to their original locations overwriting existing data files.

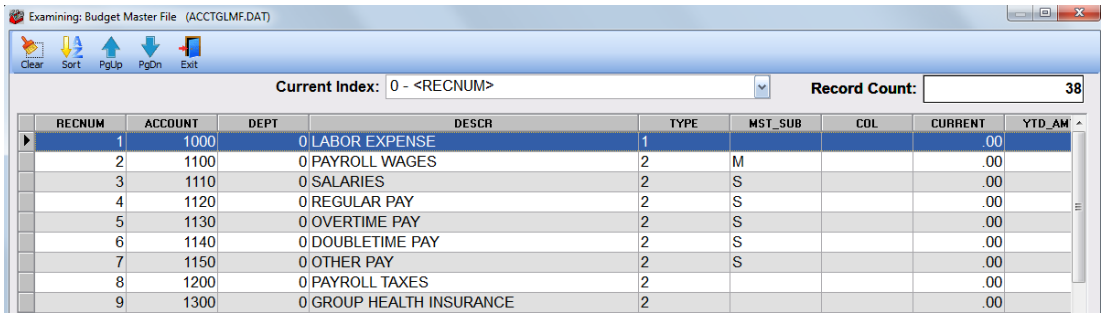
Examine Data Files

The **Examine Data Files** program permits you to view the individual records contained within each Data File.

Data files are displayed in alphabetical order. To view the contents of a specific file, double click on the **File Name** or place the scroll bar on the **File Name** and click on **VIEW FILE**.



Once displayed, you can use the **Standard Browse Table Tools** to navigate through the selected file. The width of each column can be adjusted.


Examining: Budget Master File (ACCTGLMF.DAT)
Clear
Sort
PgUp
PgDn
Exit
Current Index: 0 - <RECNUM>
Record Count: 38
RECNUM ACCOUNT DEPT DESCR TYPE MST_SUB COL CURRENT YTD_AM
1 1000 0 LABOR EXPENSE 1 .00
2 1100 0 PAYROLL WAGES 2 M .00
3 1110 0 SALARIES 2 S .00
4 1120 0 REGULAR PAY 2 S .00
5 1130 0 OVERTIME PAY 2 S .00
6 1140 0 DOUBLETIME PAY 2 S .00
7 1150 0 OTHER PAY 2 S .00
8 1200 0 PAYROLL TAXES 2 .00
9 1300 0 GROUP HEALTH INSURANCE 2 .00

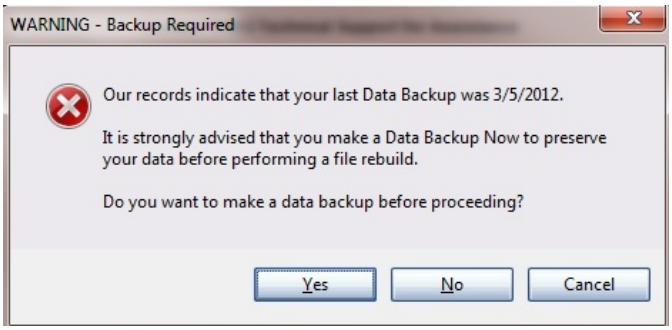
The **Record Count** field displays how many entries/records that are contained within this data file and the **Current Index** field displays the sort order in which entries/records are currently being viewed on screen. Click on the Down Arrow at any time to change the Current Index.

File Rebuild & Data Compaction

Would you like to reduce the amout of time it takes to backup your data files to the TRIMS Server? The **File Rebuild & Data Compaction** procedure will compact all TRIMS data files and remove blank space left by deleted items. Before you begin, logoff all other TRIMS Users and close all TRIMS Programs.

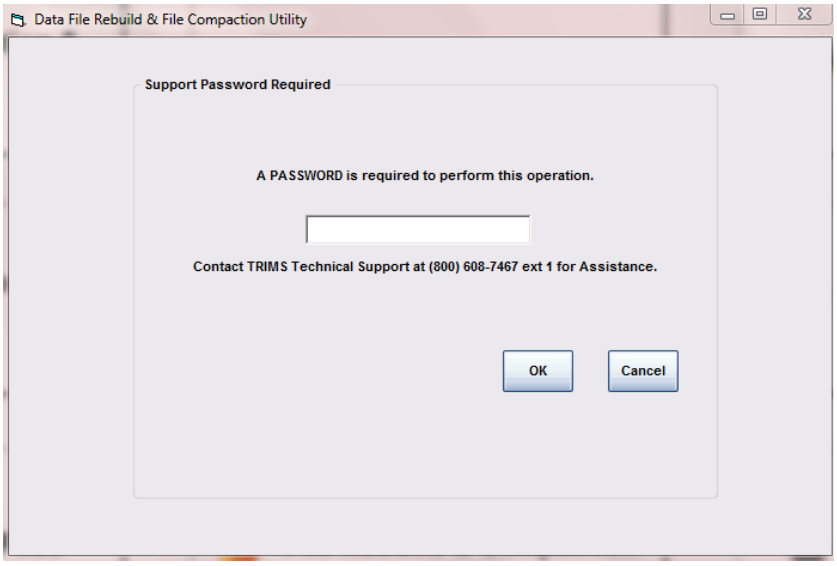
Backup Required

It is strongly suggested that you backup your TRIMS data files before starting this procedure. A backup to your hard drive will be sufficient.


WARNING - Backup Required
Our records indicate that your last Data Backup was 3/5/2012.
It is strongly advised that you make a Data Backup Now to preserve your data before performing a file rebuild.
Do you want to make a data backup before proceeding?
Yes
No
Cancel

Once the backup procedure has been completed, the **Data File Rebuild & File Compaction Utility** will appear on screen.

A PASSWORD is required to perform this operation; you MUST contact TRIMS Technical Support.


Data File Rebuild & File Compaction Utility
Support Password Required
A PASSWORD is required to perform this operation.
Contact TRIMS Technical Support at (800) 608-7467 ext 1 for Assistance.
OK
Cancel

Custom Report Writer

The **Custom Report Writer** enables you to extract information quickly and easily from your system's database file to create customized reports and provides you with a powerful "ad hoc" query that will enable you to verify the contents of a database file.

Introduction

Although your system contains numerous standard reports, from time to time you may need to create a report with specific information.

We have provided the Custom Report Writer to give you the capability and flexibility to produce up to the minute reports from information contained within your system's database using parameters that you specify.

Simply choose the data file to be reported, select the fields to be included, and print the report.

Additional features of the Custom Report Writer include column formatting, column arithmetic operations, column sub-totals and grand totals. Multiple selection criteria provide a full range of logical selections allowing you to extract just the information you want.

Once you have completed a particular report, you can save its specifications and interactively edit it before printing your final report. Existing report specifications may be recalled at a future time, edited with new selection criteria and run again.

Security with the Custom Report Writer

From time-to-time other users other than the System Administrator may need access to print a Custom Report.

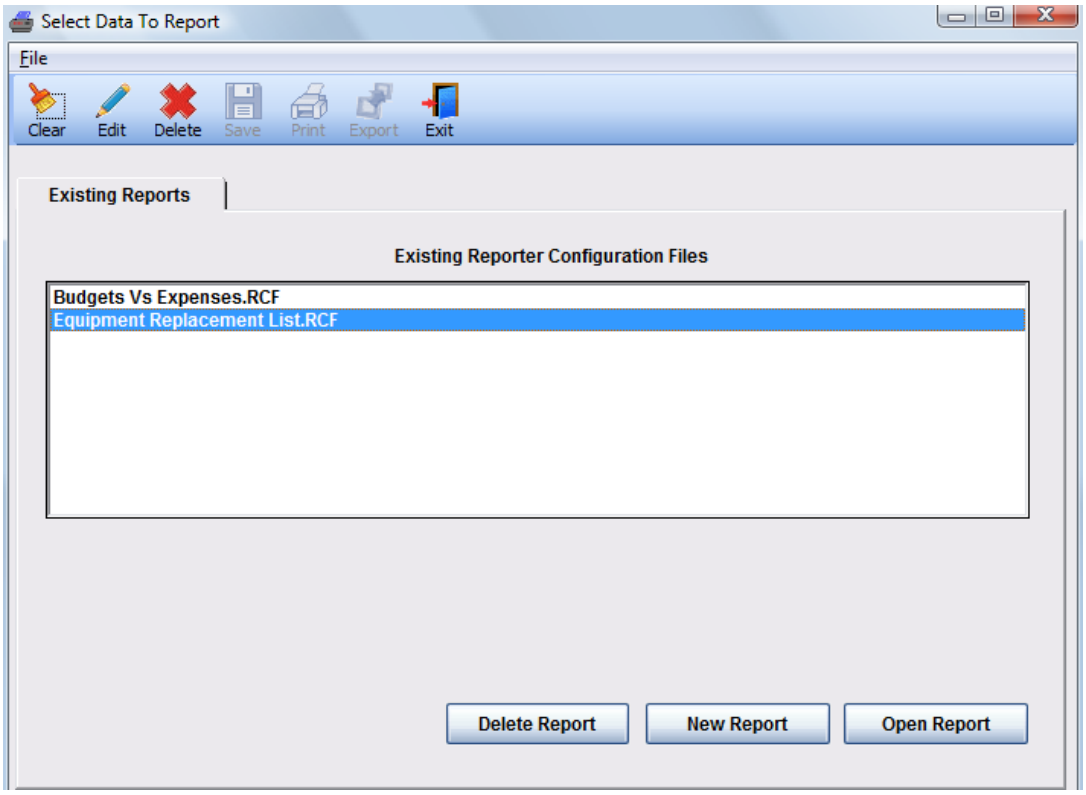
Once a Custom Report has been created by the System Administrator, the Report can be saved into different User folders. When a User logs into TRIMS and accesses the Custom Report Writer, a folder is created with the User's Login Name. The System Administrator can design the Custom Report and save the report into the User's folder for their access. The User will then be able to access, make temporary report changes and run the report.

Only the System Administrator can CREATE and CHANGE Custom Reports.

To run the Custom Report Writer from the **Main Menu**, click on the **Tools Pull-Down Menu**, then choose **Custom Report Writer**.

Report Selection

Upon starting the Custom Report Writer, the **Report Selection Panel** appears with a list of existing reports. An existing report may be selected or a new report may be created at this time.



Delete Report

Click on one of the report specifications displayed on the Report Selection Panel and click on **DELETE REPORT** and confirm to delete the report specification.

New Report

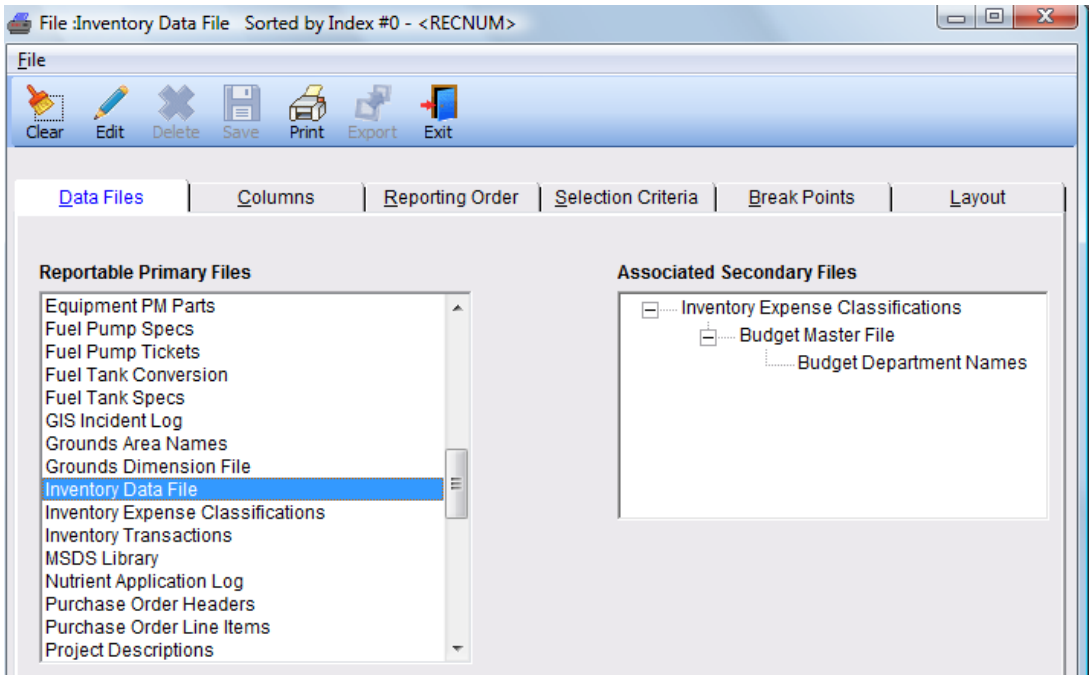
To create a New Report, click on **NEW REPORT** to display the Data File Selection Panel.

Existing Report

To load an Existing Report, click on one of the report specifications displayed on the Report Selection Panel and click on **OPEN REPORT**. The report specification will be loaded and the Layout Panel will be displayed.

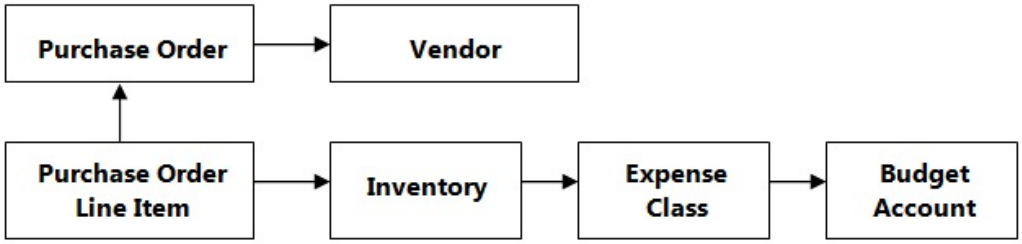
Data File Selection

Click on a file from the list of Reportable Primary Files. If there are any Associated Secondary Files linked to the Primary File they will be displayed in the Associated Secondary Files List.



Associated Secondary Files

The illustration below shows an example of the Secondary Files associated with the Purchase Order Line Item file.



Purpose

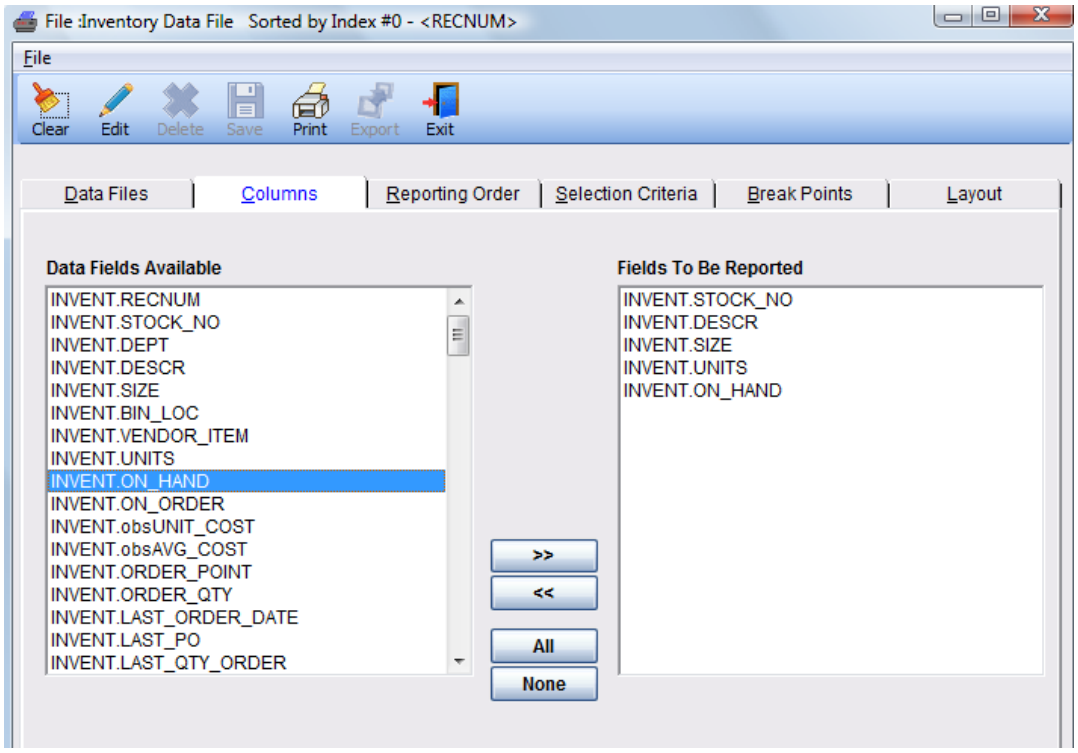
The Secondary Files provide a path or relationship to all information related to the Primary File. As each record in the Primary File is found, the related records in the Secondary Files are also loaded into memory as if they were part of the Primary File.

Removing Secondary File Links

If you do not wish to use information from a Secondary File, you should remove the Secondary File from the list to maximize the Report Writers search efficiency. To Remove a Secondary File, click on the **file** in the Associated Secondary Files List with the right mouse button and then click **OK** to remove the link.

Column Selection

Select each field to be reported by clicking on the desired field in the **Data Fields Available List** and then clicking on the **>>** button to copy the field to the **Fields To Be Reported List** or click **ALL** to copy all fields from the Data Fields Available List to the Fields To Be Reported List. You may also copy a field by double clicking on the item in the Data Fields Available List.



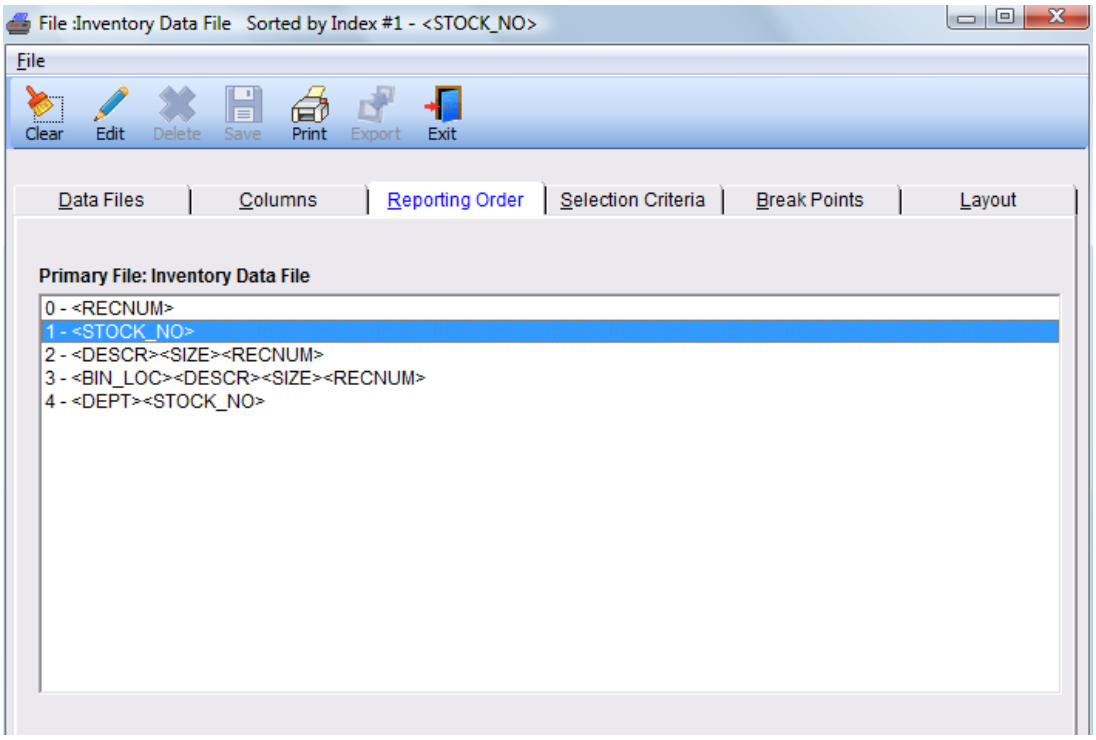
The sequence of the fields in the **Fields To Be Reported List** will determine the column order on the final report. You may rearrange the order of fields in the Fields To Be Reported List by placing the mouse cursor over the field to be moved, depressing the left mouse button, moving the cursor to the new position in the list and releasing the mouse button.

To remove fields from the **Fields To Be Reported List**, select the **field** and click the **<<** button or click **NONE** to remove All Fields.

Data File and Field Descriptions can be found in the Data File Dictionary (Appendix B) of the TRIMS Reference Manual.

Reporting Order

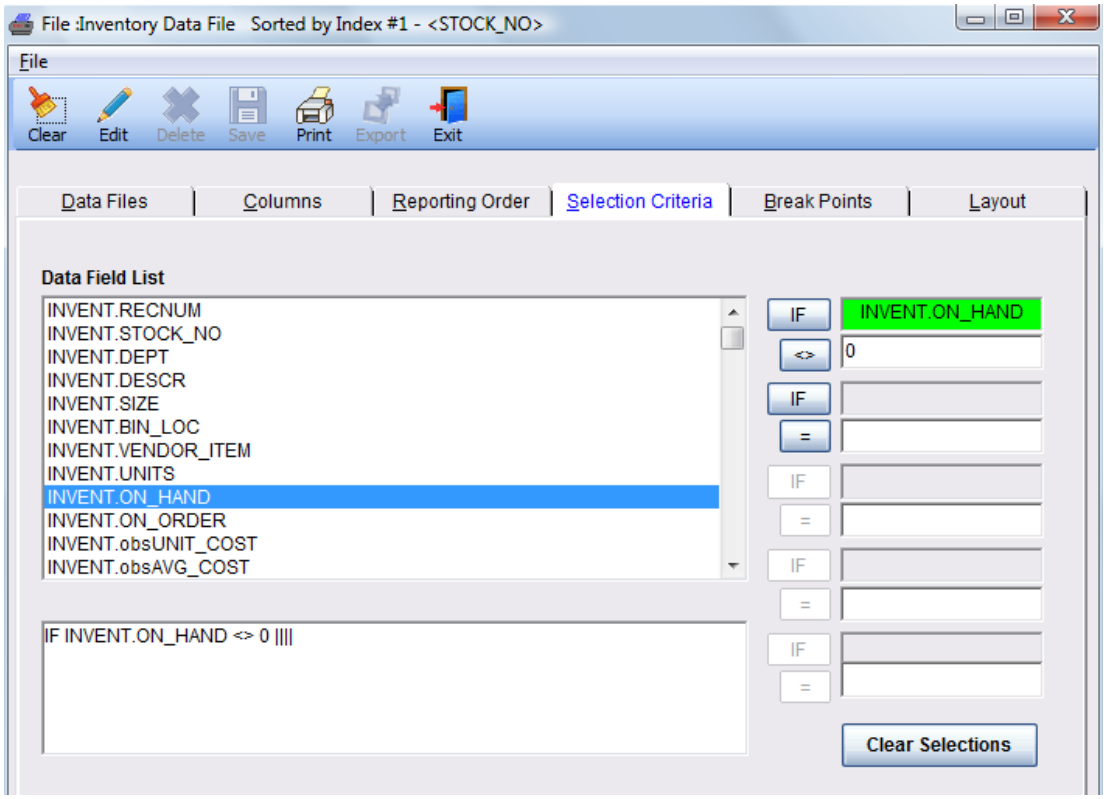
The Reporting Order Panel permits you to select the sequence in which the reported data is to appear. Selected records may be listed in any of the sequences described by the displayed file indexes.



In this example, the Primary File may be sorted in any one of five (5) different ways. Click on the desired Sort Order to select.

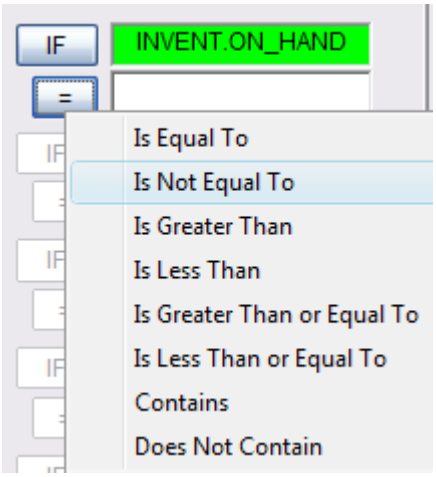
Selection Criteria

The Selection Criteria Panel permits you to specify the conditions that must be met before a record is included in the report. A combination of up to five (5) **IF/AND** conditions and eight (8) comparison types can be used to qualify a record for selection.



The first selection criteria must always be **IF** and it will appear highlighted in green. Select the data field to be used in the comparison by double clicking on the item in the **Data Field List**. The selected field name will then appear in the **Selection Settings** column next to the first **IF** condition.

Next, specify the condition that must be met by clicking on the equal **"="** button.



Choose one of the listed comparison types and then specify the value to be compared against the selected field contents.

Comparison Types

1. Field Contents **Is Equal To** Specified Value
   Invent_On_Hand = 0 will select items with nothing on-hand

2. Field Contents **Is Not Equal To** Specified Value
   Invent_On_Hand < > 0 will select items with something on-hand

3. Field Contents **Is Greater Than** Specified Value
   Invent_On_Hand > 5 will select items with more than 5 on-hand

4. Field Contents **Is Less Than** Specified Value
   Invent_On_Hand < 10 will select items with less than 10 on-hand

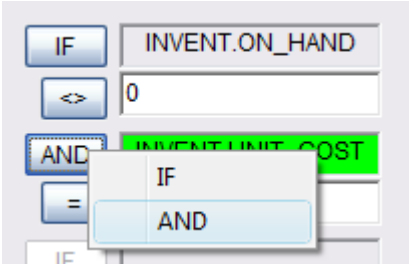
5. Field Contents **Is Greater Than or Equal To** Specified Value
   Invent_On_Hand >= 5 will select items with 5 or more on-hand

6. Field Contents **Is Less Than or Equal To** Specified Value
   Invent_On_Hand <= 5 will select items with 5 or less on-hand

7. Field Contents **Contains** Specified Value
   Invent_Descr ( ) Bearing will select items with the word Bearing in the Description
   Note: The **Contains** comparison is case insensitive.

8. Field Contents **Does Not Contain** Specified Value
   Invent_Descr ( ) Bearing will select items without the word Bearing in the Description
   Note: The **Does Not Contain** comparison is case insensitive.

Up to four (4) additional comparisons using **AND/IF** conditions may be made to further qualify your selection.



Example: To select Inventory Items with more than 8 On-Hand with Unit Costs between $10.00 and $20.00 each use the following criteria:

IF INVENT_ON_HAND **>** 8
AND INVENT_UNIT_COST **>=** 10
AND INVENT_UNIT_COST **<=** 20

To select only Inventory Descriptions containing Belt, Blade or Bearing use the following criteria:

IF INVENT_DESCR **( )** Belt
IF INVENT_DESCR **( )** Blade
IF INVENT_DESCR **( )** Bearing

Improving Reporting Speed

In the above example, all records in the Inventory Data File must be examined to see if they meet the selection criteria.

If the selection criteria specifies a field that is the first segment of the Reporting Order then it is possible to search only a limited portion of the file and significantly improve the speed of reporting as shown in the following examples.

To report all items in Parts Location “B-001” with a cost of $10.00 or more, use the following specification:

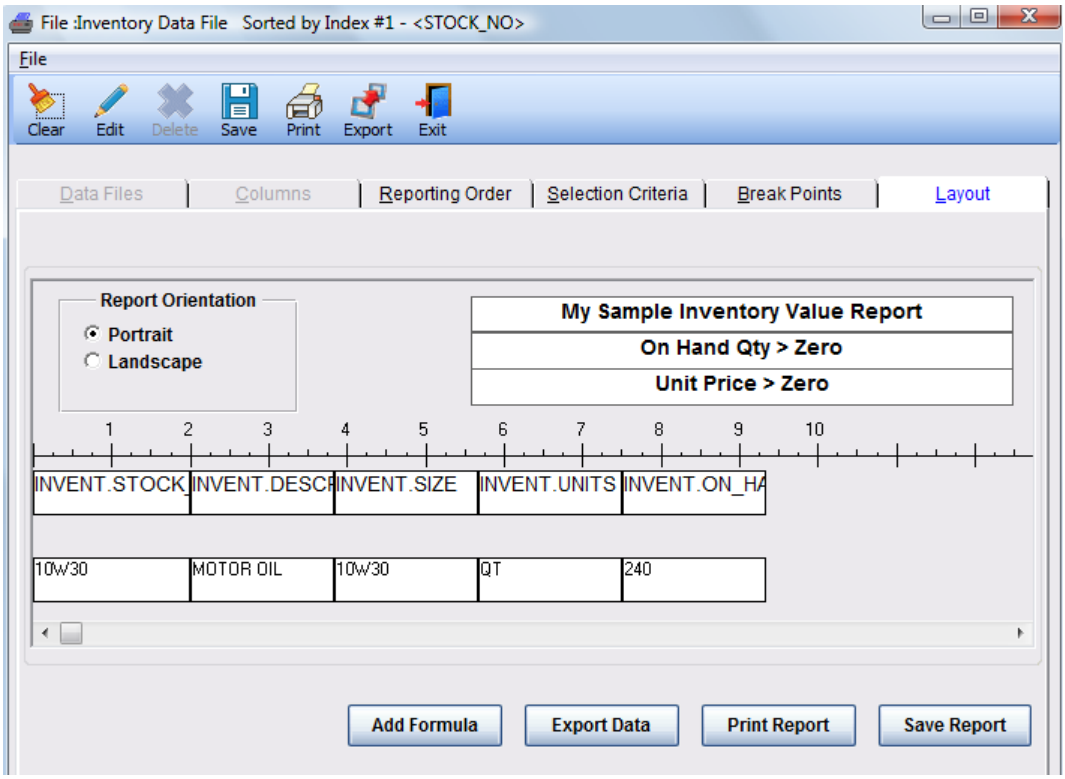
Reporting Order: 3 - <BIN_LOC><DESCR><SIZE><RECNUM>
IF INVENT_BIN_LOC = B-001
AND INVENT_UNIT_COST >= 10.00

To report all items in Parts Location “B-001” **-** thru “B-999” with a cost of $10.00 or more, use the following specification:

Reporting Order: 3 - <BIN_LOC><DESCR><SIZE><RECNUM>
IF INVENT_BIN_LOC >= B-001
AND INVENT_BIN_LOC <= B-999
AND INVENT_UNIT_COST >= 10.00

Column Layout

The Column Layout Panel allows you to fine-tune the appearance of the reported information. Format options give you complete control over Page Orientation, Page Headings, Column Width, Column Headings, Column Alignment, Fonts and Column Formats. Formulas may also be entered to create new column information based on the results of a calculation.



Report Orientation

Select Report Orientation of either Portrait (8.5” W X 11” H) or Landscape (11” W X 8.5” H) by clicking on one of the Report Orientation Buttons.

Report Heading

A three-line heading will be printed on all reports. Enter the text of your choice in the three displayed fields.

The current date can be automatically displayed in the report heading by entering one of the following commands in a field of the report heading.

Date	Use Windows default Date Format
Short Date	Display date as 05/23/00
Long Date	Display date as May 23, 2000

Column Width

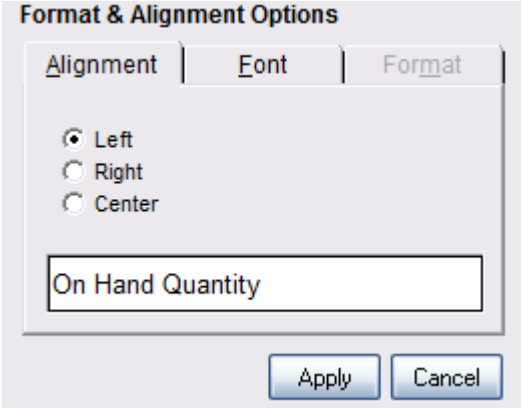
To adjust the width of each individual column, click on the desired column and it will be highlighted in green. Position the mouse over the right side of the column to display a double headed arrow. Hold down the left mouse button and drag the column border to set the column width. Columns that are set to a minimum width will not appear on reports.

Format and Alignment Options

The Format and Alignment options allow you to specify Alignment, Font Style, Font Size and Numeric Formatting of all data included in your report. To display the Format and Alignment Options Panel, right click or double click in the desired heading or data field to be formatted. Once all format and options for this field have been selected click on Apply to activate the new format and alignment options. Repeat for each column to be formatted.

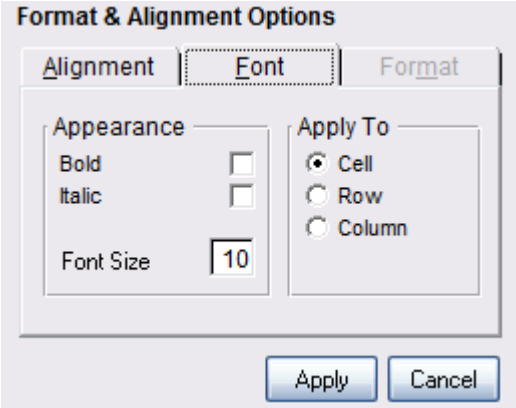
Column Alignment

Options on the Alignment Tab allow you to display column headings and report data either centered within a column, flush right or flush left. Changes made to the Column Alignment or Column Heading will be displayed in the sample field on the Alignment Tab.



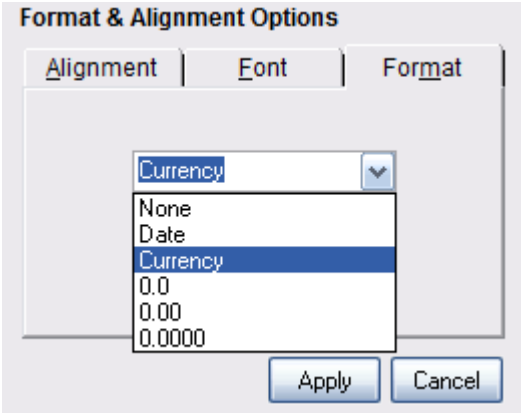
Font Selection

Options on the Font Tab allow you to select Bold Face, Italics and Font Size for individual Columns, Rows or Data Fields. After making Appearance selections, indicate if this change will Apply To the current Cell, Row or Column. Changes made to the Font Style and Size will be displayed in the sample field on the Alignment Tab.



Column Format

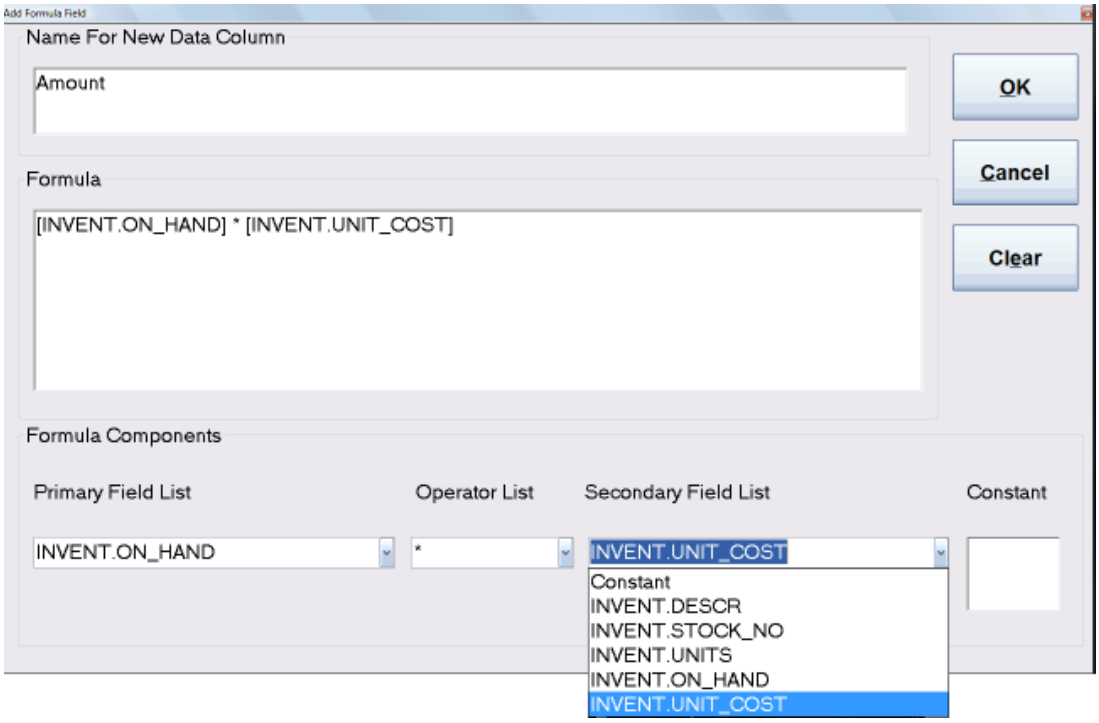
Options on the Format Tab allow you to specify the formatting of Numeric Columns and Formula Columns from a list of common data formats. Changes made to the Numeric Format will be displayed in the sample field on the Alignment Tab.



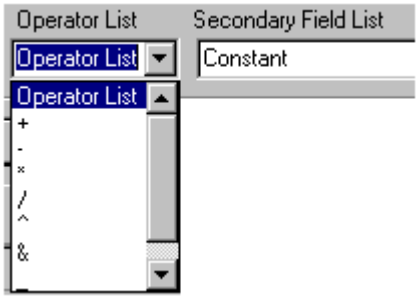
Formulas

Formulas give you the ability to create new column data based upon calculations made with existing column data fields. Use Formulas to show the Sum or Difference of two columns or to show extended costs of labor and materials.

To add a formula to your report, click on the **Add Formula** button on the Layout panel and the Add Formula field window will be displayed.

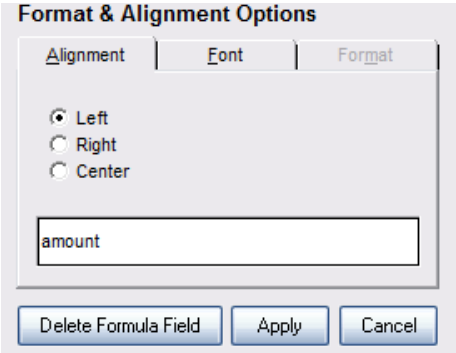


Enter the Name for the New Data Column and then select a data field from the Primary Field selection list. Next select an Operator from the Operator selection list and select a secondary data field from the Secondary Field list or select Constant and enter a constant value.



Deleting Formulas

To Delete a previously defined formula, right click or double click in the desired formula Column Heading or formula Column Data Field. The Format and Alignment options panel will be displayed and a Delete Formula Field button will be visible. Click on the Delete Formula Field button to remove the selected Column and Formula.



Operators

+ Sum of two numeric values
Primary_Field **+** Secondary_Field

- Difference of two numeric values
Primary_Field **-** Secondary_Field

***** Product of two numeric values
Primary_Field * Secondary_Field

/ Division of two numeric values
Primary_Field **/** Secondary_Field

^ Exponentiation of two numeric values
Primary_Field ^ Const 2

& Combine two alphanumeric values
Primary_Field & Secondary_Field
ABC & DEF = ABCDEF

_ Combine two alphanumeric values with space separation
Primary_Field _ Secondary_Field
ABC _ DEF = ABC DEF

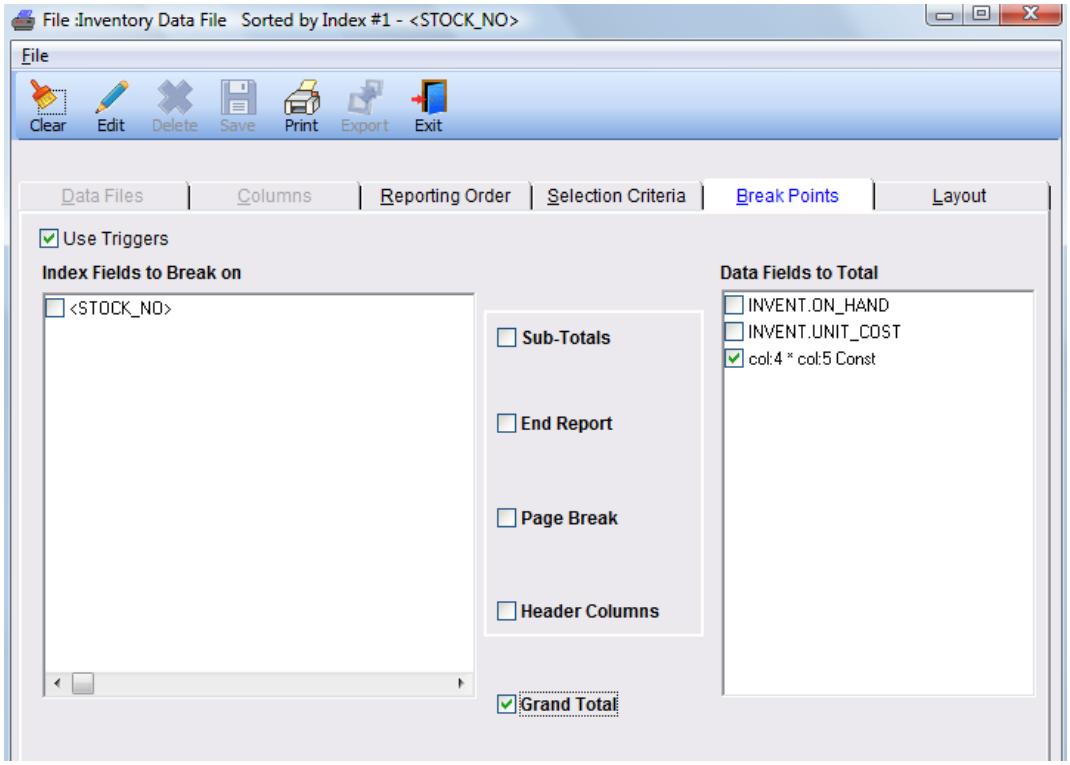
, Combine two alphanumeric values with comma and space separation
Primary_Field + Secondary_Field
ABC , DEF = ABC, DEF**,**

Click **OK** after making your selections and the new Data Column will appear on the Layout Panel.

Break Points

Break Point functions allow you to specify the columns of numeric data to be included in group sub-totals and grand totals.

Initially, all functions on the Break Point panel are disabled. Activate the Break Point functions by clicking on **Use Triggers**.



Selecting Columns to Total

The Data Fields to Total list contains all Numeric data fields that can be totaled. Select the items to be totaled by clicking on the check box next to each item.

Creating Sub-totals

Sub-totals can be generated whenever a key value changes. Key values are the individual items listed in the Index Fields to Break list. Select the items you wish to use to trigger sub-totals and then select the appropriate Break Option from the center column on the screen.

For example, when reporting Fuel Tickets sorted by <Pump> and <Date>, sub-totals can be generated each time the Date Changes for a specific Pump and each time a New Pump is reported.

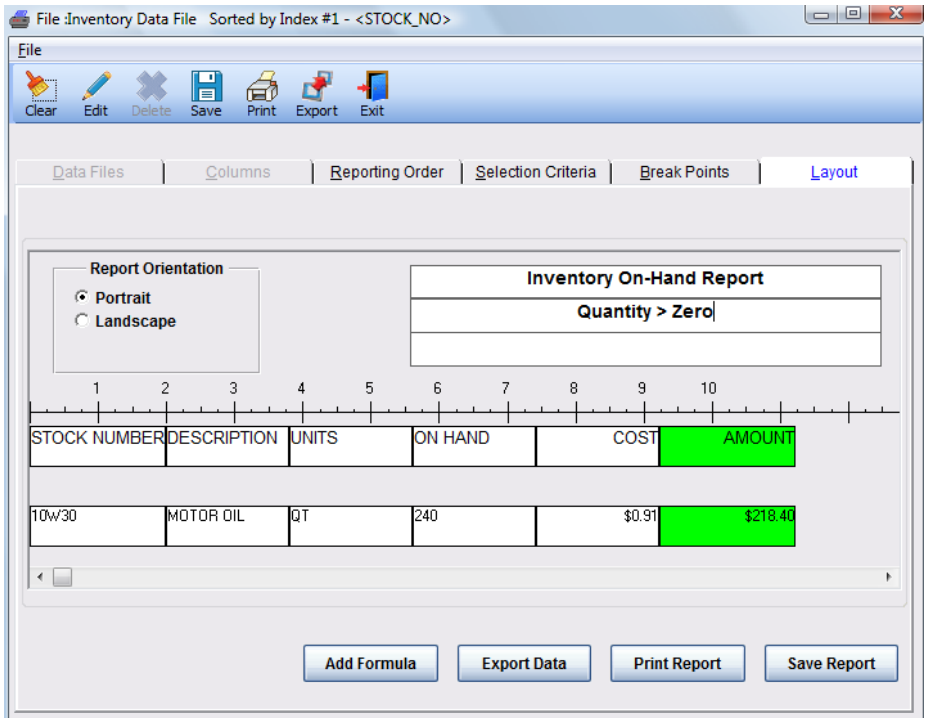
Break Options

Sub-Totals	Prints a sub-total of all selected total columns when an index field changes.
End Report	Terminate report when an index field changes.
Page Break	Continue the report on the top of a new page when an index field changes.
Header Columns	Print a Sub header containing the Index Field data when index fields change.
Grand Total	Print a Grand Total of all Sub-Totals at the end of the report.

After making all selections, click on the **PRINT** tool to return to the Layout Panel.

Printing/Saving/Exporting

Once all report specifications have been made, you have the option of **Printing** the report, **Exporting** the data to a delimited text file or **Saving** the report specification.



Save Report

Click on the **Save Report** button and a file dialog box will appear. Enter the name of the report and click on the **SAVE** button. This named report will appear in the list of available reports when opening reports or restarting the Custom Report Writer.

Print Report

Click on the **Print Report** button to either Preview the report or Print the report based upon the current workstation Print Preview setting.

Export Data

To send unformatted report data to an ASCII delimited text file, click on **Export Data**. A file dialog box will appear and you may enter a file name of your choice. Click **OK** and indicate your preference of either Tab Delimited (Yes) or Comma/Quote Delimited (No) output.

After exporting, the exported file will appear on screen in Windows Notepad and may be further edited.